

# Project Closeout Report

## Presented to the IT Committee March 24, 2010

**Project Name:** Mainframe Rewrite (T-DOC)

**Agency:** State Treasurer's Office (STO)

**Business Unit/Program Area:** n/a

**Project Sponsor:** Kelly Schmidt

**Project Manager:** Sarah Lee

Objectives		
Project Objectives	Measurements	
	Met/ Not Met	Description
User-friendly and easy-to maintain environment	Partially Met at this time	<p><b>Measurement:</b></p> <p>Goal is to have cost and time associated with change requests reduced by 50% in the 2009-2011 biennium.</p> <p><b>Results:</b></p> <p>While this measurement cannot be taken until the end of the 2011 biennium, STO's change requests costs were \$33,633 with an average ticket duration of 11 days during the 2005-2007 biennium. Because of the extension of the project schedule, this will not be measured until the 2011-2013 biennium.</p> <p><b>Measurement:</b></p> <p>Goal is to have STO staff productivity increase by 20% and minimize the involvement of the Deputy State Treasurer.</p> <p><b>Results:</b></p> <p>STO estimated that the original distributions took approximately 2 weeks. Current observations have shown that staff has completed them 3-5 days earlier than goal.</p>
Applications will support complex distribution formulas created by North Dakota Century Code	Met	<p><b>Measurement:</b></p> <p>Goal is that STO will be able to determine and update the formulas utilized.</p> <p><b>Results:</b></p> <p>STO knows where to go into the new application to change the formulas.</p>

Schedule Objectives					
Met/ Not Met	Original Baseline Schedule (in Months)	Final Baseline Schedule (in Months)	Actual Schedule (in Months)	Variance to Original Baseline	Variance to Final Baseline
Not Met	21	22	32	57.5% over	49.8% over

Budget Objectives					
Met/ Not Met	Original Baseline Budget	Final Baseline Budget	Actual Costs	Variance to Original Baseline	Variance to Final Baseline
Met	\$664,942	\$515,560	\$480,591	27.9% under	5% under

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### Major Scope Changes

1. Addition of one-time weather-related distributions
  - a. Additional cost was absorbed into the project because we were so far under budget. Therefore there was no cost impact.
  - b. Additional time required to complete this work was four weeks.

### Lessons Learned

1. Discussion of ITD's cost estimate needs to happen at the beginning of the project with regards to the ongoing costs and what those entail.
  - a. Example: STO did not realize that the ongoing costs that were originally estimated included costs for other agencies accessing their application. Had they known, they would have reviewed these potential costs before releasing this ability to the other agencies in the new system due to STO's minimal IT budget.
2. More time needs to be spent mitigating the reporting risks when using Cognos and data models, including the resources available from ITD and the agency.
  - a. Example: When the project team made the decision to use Cognos as the reporting tool, we did not approach it as a new technology and therefore did not include enough effort identifying the risks involved and the mitigation strategies required.
3. Risk on a rewrite can be mitigated with an iterative or phased approach.
  - a. Example: While the project plan called for only two phases (Oil and Gas, and then the rest), we found during the project that it made more sense to put each element into production as it was completed. This allowed the project team to make fixes that would increase the quality of future iterations and gave STO access to their applications earlier in the schedule.
4. When implementing a new technology, the agency's risk tolerance needs to be discussed.
  - a. Example: It is possible that the State Treasurer's Office would not have chosen to be one of the first users of Cognos if a full risk assessment was completed at the time of the decision, as the extra time needed to retest the Cognos fixes needed put a burden on their staff.
5. ITD should have considered hiring a Cognos expert/consultant to assist us with the initial setup of the data models and reports.
  - a. Example: ITD did not fully realize the challenge of the Oil and Gas reporting and therefore the work on the data models and reporting was more challenging than anticipated.
6. Thought needs to be given as to the testing effort required by the agency resources when using a new technology, especially if the agency resources are not dedicated to the project.
7. Additional time should be included in the project as risk when there are limited Information Technology Department (ITD) resources.
  - a. Example: ITD had only Jo Marie Sellner who could create the data model for the Cognos Reports. She was also the only experienced resource for writing reports in Cognos. Therefore there were delays while Jo Marie was doing work for other projects or in training.
  - b. Example: Kimber was trained to write Cognos reports to lessen Jo Marie's required time on the project. However, this was his first project, so there were delays caused by a learning curve.
8. Additional time should be included in the project as risk when there are limited agency resources.
  - a. Example: STO had only two resources who could do the testing. Therefore when Tammy terminated employment with STO, Deb was unable to continue the testing due to her increased functional workload.
9. The agency and project manager need to determine the priority of the agency resources' functional work vs. project work before creating the schedule.
  - a. Example: The project schedule was created based on the STO resources being available as needed for project work. In reality, additional time should have been allotted to the STO activities to allow for the project work to fit into the functional work.

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### **Success Stories**

1. Other agencies now have the ability to use the system to access their checks, and feedback has been positive regarding ease of use and efficiency.
2. STO has the ability to review preliminary reports before processing the final distribution. In the old system there was no going back once the job was run.
3. There was a consistent and timely flow of information from the project team to the project manager, thereby eliminating the standard need for regular status meetings.
4. The phased implementation had the benefit of allowing the implementation of each application as it was tested, instead of waiting until the end of the project to use the completed applications. This allowed STO to have access to their applications much earlier.